Withholding Info W4-W5 Election

<div style="float:right">**PA30**</div>

Change History

Update the following table as necessary when this document is changed:

Date	Name	Change Description
12/15/2004	Ligaya West	Updates & Edits
1/27/2006	Heather Hanson	Update
5/14/2009	Patty Peterson	Update description of Start Date field.
1/11/2010	K. Welsh	Updated screen shots to match current system. Added note for Start date field if completing for a new hire.

Purpose

Use this procedure to maintain (change) an employee's W-4 or W-5 election.

Trigger

Perform this procedure when there is a change requested by an employee that affects their W-4 withholdings.

Prerequisites

- The employee must be in active status.

Menu Path

Human Resources → Personnel Management → Administration → HR Master Data →Maintain

Transaction Code

PA30

Helpful Hints

The Payroll Processor will use this procedure to update an employee's W4 or W5 information.

Procedure
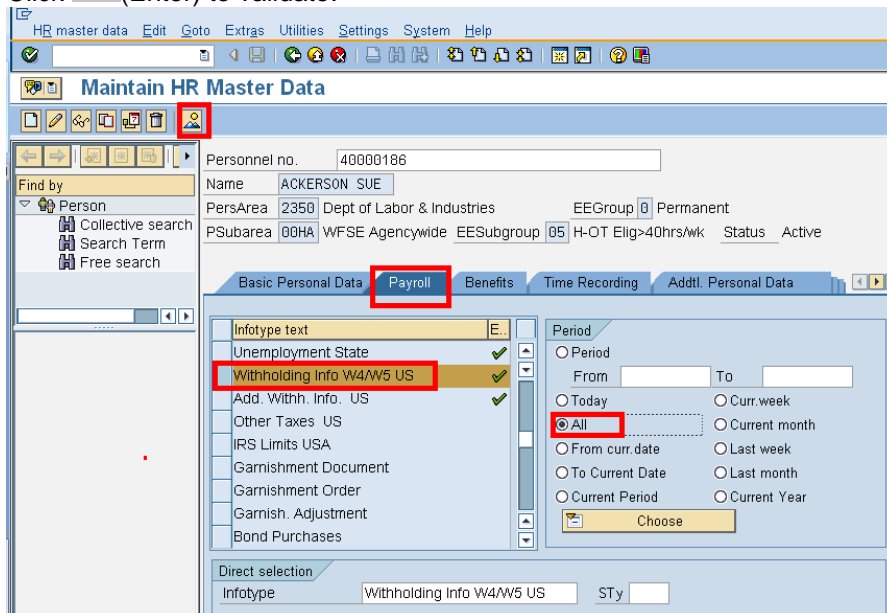
1. You have started the transaction using the menu path or transaction code.

Maintain HR Master Data

2. As required, complete/review the following fields:

Field Name	R/O/C	Description
Personnel no.	R	This is a unique identifying number assigned by HRMS for identification purposes. This number will follow the employee throughout his/her employment with the State of Washington. This will replace the use of identifying employees by social security number. **Example:** 40000186

3. Click to validate.

4. Select the **Payroll** tab. Scroll down and click the grey box to the left of *Withholding Info W4/W5 US* (Infotype 0210).

5. Click the ![] (Overview button)

6. Click the grey box to the left of the record to be changed.

7. Click ![] **(Copy).**

Copy Withholding Info W4/W5 US (0210)

4. As required, complete/review the following fields:

Field Name	R/O/C	Description
Start (date)	R	If making a W4 change: The Start date must be entered as the previous **Check Date**[1] **plus one day.** **Example:** The previous Check Date was 12/25/2009, then the Start (date) will be entered as 12/26/2009. i **Note:** If this is for a **new hire** you would use the employee's **hire** date. [1] **Check Date's** are listed on the HRMS Payroll Calendar http://www.dop.wa.gov/payroll/HRMS/PayrollCalendarSchedules/Pages/default.aspx which can be used to verify the **check date** as there are a few check dates that don't fall on the 10th or 25th .
Filing Status	R	This is a status elected by the employee for federal tax withholding. **Example:** 02
Allowances	R	This is the number of dependents claimed for tax filing purposes. It affects the amount of taxes withheld from an employee's paycheck. **Example:** 1
Add.withholding	O	This is an amount designated by the employee to be withheld from his/her check above the amount that will be taken due to filing status. **Example:** 250.00

5. Click (Enter) to validate.

6. Click (Save).

   The system displays the message, "Record Changed."

7. You have completed this transaction.

Result

You have successfully updated an employee's W-4 election while the employee is active.

Note: This procedure details how to make a change to this infotype while the employee is in active status and either requests the change or is transferring to another agency.